

On-Site School Food Authority Review of Meal Counting and Claiming Procedures

School District: _____

Date: _____

School: _____

Reviewer: _____

Standards and Assessment

(Special Instruction: Explain all "no" answers through comment and completion of the attached checklist.)

1. The master list/roster of approved applications is current and correctly maintained. The master list accurately reflects names and eligibility of approved free and reduced-price meal applications. (See attached Worksheet 1.)

☐ Yes

☐ No

2. Updating of master list/roster(s) accounts for changes and/or termination of benefits for withdrawals, temporary approvals, and verification.

☐ Yes

☐ No

3. The school's procedure for counting meals is the same as approved in the district's current policy statement.

☐ Yes

☐ No

Explain: _____

4. The school's procedure for counting meals is correctly and consistently interpreted by staff. (See attached Worksheet 2.)

☐ Yes

☐ No

5. The approved collection/meal count procedure is correctly implemented for lunch.

☐ Yes

☐ No

6. Enter the student meal count by category on the day of visit.

	Lunches	Breakfasts
Paid		
Free		
Reduced		

7. The total number of free and reduced-price meals claimed does not exceed the number of currently approved applications for the previous ten serving days or on the day of the visit. Review appropriate daily participation reports for this comparison. Comment on any noted differences or discrepancies.

8. The total number of meals served does not exceed attendance.

a) Total meals served to students: _____

b) Attendance on the day of visit: _____

If (a) exceeds (b) a major counting and claiming problem exists.

9. Meal counts from the previous three months reflect no unexplained significant variations from counts on the day of visit. Explain any problems noted.

10. Written documentation and all records pertaining to prepaid and charged meals (if allowed) are maintained.

☐ Yes

☐ No

On-Site Review Summary

Briefly describe any problems identified.

If a problem has been identified, a corrective action plan is required. Describe actions needed and conduct a follow-up visit within 45 days. Document all findings of the follow-up visit. If the required corrective actions were not taken, describe what will be done to ensure immediate and future compliance.

Review Verification

Information from any point in the meal count/collection procedure which becomes part of a reimbursement claim must be accurate. I have assessed and tested the accuracy of the system used for collecting and transferring actual data submitted on the claim for federal reimbursement with no problems determined except as identified and corrected.

Reviewer's Signature: _____

Date: _____

School Official Signature: _____

Date: _____

Worksheet 1: Application and Roster Errors

SFA:

SCHOOL:

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[illegible]

Code Key: ELIG DET (Eligibility Determinations) CH NM (Child's Name) CS# (Case Number) HH NM (Household Name) INC (Income)
SRC (Source) AMT (Amount) SS# (Social Security Number) ADU SIG (Adult Signature)

Reviewer:

Date:

Worksheet 2 On-site SFA Review: Meal Counting and Claiming Evaluation

Instructions: Observe meal counting at the point of service and follow the claiming procedure. If errors are observed in meal counting or claiming, place a check in the box provided next to the appropriate error description. Enter the number of meals that were observed to be claimed in error. Add comments, including whether the error observed was a clerical error or is due to a system problem.

Error Description	Problem Observed	Number of Meals	Comments (note if clerical or systemic)
Head counts or tray counts are used to obtain the number of reimbursable meals.			
The point of service (sale) is located at the beginning of the serving line.			
Morning/classroom counts are used for the meal count.			
Attendance counts are used for the meal count instead of actual point of service.			
A category count is obtained by "backing out" numbers (for example, adding up the number of free category meals and the number of paid category meals and designating all the rest of the meals served as reduced category).			
A category count is obtained by "backing out" cash (for example, dividing the amount of cash on hand by the price of a regular meal and using the result as the number of paid meals claimed).			
Prepaid or charged meals are claimed on the day that money is received instead of at the point of service as the meal is served.			
Meals are not checked to be sure all required components are served before claiming the meal.			
Meals served to ineligible persons are claimed for reimbursement.			
Customers are identified visually and meals claimed with no valid medium of exchange used or presented.			
The master roster is not updated.			
Second meals served to eligible students are claimed for reimbursement.			
Other:			